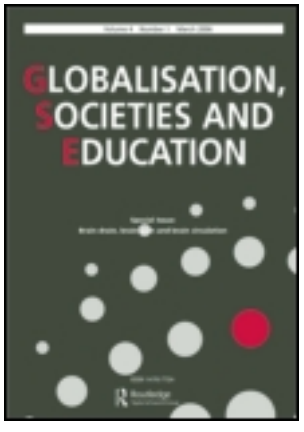

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Lifelong education and learning, societal project and competitive advantage: tensions and ambivalences in policy and planning of educational change in Portugal

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Lifelong education and learning, societal project and competitive advantage: tensions and ambivalences in policy and planning of educational change in Portugal

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Both the Portuguese appropriation of the lifelong learning policy proposed by the European Union since the mid-1990s and the definition of adult education policy in Portugal were based on a discourse that emphasised an 'unacceptable educational deficit' for democracy. The role of the State in the *governance* of the public provision of adult education was linked to its disengagement or precarious contractual involvement in the same. In this article, we discuss developments in adult education and training policy from the mid-1990s to 2010 in terms of an ambivalent policy dynamic and orientation of educational change, examining how a civil society organisation used adult education as a tool for rural development, to support the economy and individual resilience in the face of socio-economic weaknesses and risks.

Keywords: lifelong education and learning; managerial State; globally structured national agenda; governance of education; adult education; Portugal

Contextualising adult education policy: Portuguese specificity or challenging the *globally structured agenda*?

In these initial sections, we argue that (1) structural conditions related with socio-historical pathways are responsible for the main parameters of Portuguese adult education policy; (2) ambivalence and tensions are a result of policy development, generated within the interplay between European, national and local dimensions, among others. The aforementioned structural conditions (e.g., the failure of Portuguese democracy to overcome the long-term, neglected educational *deficit* of the adult, Portuguese population, or the weaknesses of organised civil society) encourage temporary and partial coalitions between grassroots educational activists, *progressive pedagogues*,

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academics, some political decision makers and members of the top or intermediate administrative educational structure. That is why, as we shall see later, the European lifelong learning *mandate* for economic competitiveness and social cohesion could support a contradictory national State adult education policy. This has been directed at (1) the increase in educational solutions, pathways and publics, in order to rescue the basic human and social right of Portuguese adults to education (contributing to a participatory *societal project*); (2) no commitment to a public structure or a global, integrated policy, in line with neoliberal, managerial political options (to build *competitive advantage*). Empirical data show that local development and individual empowerment are the main observable (albeit problematic) goals pursued by socio-educational non-governmental organisation (NGO) action. The absence of an educational project of its own, coupled with a crucial dependency on the State, highlights the local and institutional educational conditions and consequences articulated by those above-mentioned European and national political options.

The so-called 'return' of lifelong education took place in the European Union (EU) and in Portugal during the second half of the 1990s. At this time, the socio-political climate did not favour the idea of education as a human and social right pertaining to the development of individuals and communities, preferring to see it as a private and individual consumer product which is subject to the terms of trade (Afonso 1998). The appropriation by Portugal of the lifelong learning strategy which had been advocated by the EU since the mid-1990s, and the definition of the adult education policy in this country, were based on a discourse that emphasised an 'unacceptable educational deficit' for democracy. Education was regarded as a social right to which the adult population had repeatedly been denied access by elites. The most evident outcome was a significant variance between the patterns of education in Portugal and those in other European countries.

Since that time, an ambivalent policy dynamic has been developing. At first, as can be seen in the initial programmes/documents, the proposal aimed at the building of a public, global adult education policy within a multidimensional social programme. Providing more without having to compromise, seemed to have been the political option, when in 1999 the 'To Know +. Programme for the Development and Expansion of Adult Education and Training 1999–2006' (Melo et al. 2001) was conceived. In fact, the implementation of this programme after the year 2000 had progressively moved away from what had been proposed both in the aforementioned document and also previously in 1998 in the document entitled 'An Educational Commitment in Participation of All. Strategy Document for the Development of Adult Education' (Melo et al. 1998). Adult education became a visible State policy, having a conspicuousness that until then was not known in Portugal. Since then, successive governments have referenced this sector in their programmes, and it became increasingly

relevant in the context of modernisation, the transformation into a globalised economy and the qualification of the workforce.

The growing importance of adult education was recognised in the framework of lifelong learning, according to the interpretations advocated by the EU. As a result, proposals aimed at adults benefited from funding through the European Social Fund. If this policy was once deemed to have had an educational value, as was the case of the To Know+ Programme that started in 2000[1] (Melo et al. 2001), it was seen primarily as a social, economic and employment policy, as was evident in the New Opportunities Initiative adopted after 2005[2] (Iniciativa Novas Oportunidades 2005). Therefore, in recent years, it can be said that this policy has been affected by modernisation and managerial aims, being within a national strategy of human resources development. In political discourse, the focus on competitiveness and social cohesion led to a new emphasis on qualifications and pedagogism.

Thus, from the late 1990s, the revival of the public adult education policy in Portugal has seemed to correspond to a blending by the State of the guidelines linked to the promotion of economic competitiveness and social cohesion included within the agenda of the European Employment Strategy (1998) and the Lisbon Strategy (2000). This has gone hand in hand with demands from both progressive activists in education and critical academics who, over the years, have maintained that adult education is a requirement for democracy and development (Antunes 2008, 163–171). In line with Dale and Ozga (1991), we accept that the *source* of this policy was derived from economic factors, in a context where both the State and civil society have interpreted and shaped these and other demands in the educational and political field.

In this way, a *globally structured* national *agenda* with a neoliberal orientation (Dale 2001) towards adult education has been hesitatingly practised right up until the present day. However, a more careful analysis can pick out *nuances* and patterns that have been in evidence ever since the outset, and more especially during the early stages (from 1998 to 2002). Therefore, these should be examined carefully by taking into account certain aspects that have added greater complexity to the policy which has been developed:

- the specific, heterogeneous nature of the adult education sector, in terms of the publics and agents (such as civil society organisations) involved, contexts and practices;
- the complete state of devastation and abandonment of adult education bequeathed by successive governments to the Portuguese population up until the end of the 1990s, even if in some periods (successful) short-term policies were undertaken (such as from 1974 to 1976 or from 1979 to the mid-1980s);

- the important influence of the aspirations, conceptions and practices of critical educationalists and interpretative communities associated with local development and popular education projects.

The conception, promulgation and early development of the policy involved some *progressive pedagogues* as well as socio-educational activists in peripheral areas of the education system, directed towards marginalised and structurally disadvantaged population segments, previously voted into oblivion by public policies and powerful elites. This conjuncture may have helped to make this process of socio-political innovation a contradictory and controversial grey area with regard to certain strong social interests and some policy effects in terms of empowering citizenship and social justice.

It is our belief, therefore, that these steps and political developments constitute distinctive specificities of Portuguese society in terms of its socio-educational structure. This was made evident by a *globally structured* national political *agenda* for education (Dale 2001; Antunes 2004). To that end, there has been a great deal of pressure in Portugal (both externally and internally) to address the issue of the 'backwardness of the educational qualification of the workforce'. This perspective, a clearly dominant one, has never been (or is never) alone in the educational field. Depending on the socio-historical context and contextual dynamics, the education arena is often disputed. Sometimes there is competition, at others a tense alliance between the aspirations and interventions of different socio-cultural movements, educational and critical communities demanding action (inside Portugal). These activists were also committed to the implementation of the basic right to education, culture and development, to which adults had been historically denied access. They have been persistent in their contributions, although often in a marginal and fragile way and with contradictory results challenging the dominance of established neoliberal *governance* and its consequences (Lima and Afonso 2006; Castro et al. 2007; Loureiro 2009; Rothes 2009; Sá 2009; Guimarães 2011).

Changes in State intervention in adult education

The system, as outlined both in the Strategy Document (from 1998) (Melo et al. 1998), as well as in the To Know+ Programme (implemented after 2000) (Melo et al. 2001), proposed a triple dimension organisation:

- the public State structure;
- the enlarged participation structure (of coordination of policies or of consultation practices);
- the local technical-pedagogical structure which was deemed to be mostly non-State and socio-cultural agents and civil society organisations.

The State was present through (a) a small central technical-political core; (b) a network of local and regional coordination officers within the framework of wider participation in the field of central, regional and local level entities; and (c) an autonomous and stable budget.

It was in this context, and by the evident growing distance from the proposals, that the subsequent adult education policy revealed traces of a changing State within which could be seen retraction movements of *pluralisation/decomposition* and *fragmentation/dispersion* (Offe 2005; Clarke and Newman 1997). Although the prioritisation of adult education within lifelong learning and EU guidelines at the discursive level was clear, in terms of the organisation and development of public provision there was a total lack of strong commitment by the State. In fact, this seemed to be the policy of a shrinking welfare State in relation to the more traditional redistribution functions that included adult education.

Moreover, this policy was based on *public service logic*, ensuring a widespread provision (without a public, consistent and permanent structure), as well as *program logic* – both without an autonomous public budget. If the *public service logic* served primarily to legitimise adult education as part of basic education (for all, including adults), the *program logic*, financing (with the support of the European Social Fund) a 'Programme of Support for the Initiatives of Adult Education Development', was designed to be more operational. This Programme opened up the educational framework to applications that the different organisations made in order to obtain financial resources and to promote the different public forms of provision, such as Adult Education and Training Courses, and the Recognition, Validation and Certification of Competences.

In fact, this change was implemented by the disengagement of the State relative to certain *governance* (Dale 1997, 2005) aspects of education. In this context, State involvement took shape according to ways that emphasised its retraction with regard to the distributive and democratising dimensions of public, social and educational policies, as well as the interests and demands to which these policies applied. For these reasons, an increasingly plural and decomposed State appeared, with a public policy which was shared and distributed among many (public, profit-making and civil society/*third sector*) organisations. It also appeared to be an increasingly fragmented and dispersed State. This policy was developed by a variety of *promoters*, who in turn had to reinterpret the objectives, processes and procedures imposed on them by official policy, according to their interests, as well as the problems and opportunities that the local communities faced (Offe 2005).

Further political decisions about instruments of temporary action initially (2000) concerning a *Programme (To Know+)* and later (2005) an *Initiative* (New Opportunities) were of limited duration and, especially in the case of the latter, in the scope of intervention (mainly encompassing scholarly-equivalent

modalities of education and training). These circumstances did not allow autonomous structures, which were either public and/or State coordinated or controlled, to appear. This *evasion* by the State (Santos 2005) was clear in another dimension: respecting some aspects (e.g., workers' statutes, contracts, monitoring), the network of provision was based on a general and intentionally fabricated *lack of distinction* among public (State-dependent) and private (profit-making and other civil society organisations) bodies. Even when public organisations (such as State-dependent regular schools and training centres) were called up *en masse* to carry out and provide the service, as is the case since 2005, in several important areas this was done in the same conditions, as compared to their counterparts in the private sector. This *assimilation* between public and private, with regard to the standards and conditions of production and supply of the service, is a striking feature of the policies and institutional provision of adult education in the last decade, typical of the policies and reforms of public services promoted by the *managerial* State (Clarke and Newman 1997). In this sense, the role of the State in the *governance* of the public provision of adult education was linked to its disengagement or precarious contractual involvement, even when, as currently occurs, most of it has been provided by public entities. This *contractual* spirit, which was essentially focused on the rights and obligations of the various parties, has affected the very existence of adult education as a provision, threatening the basic human right to education with uncertainty and risk. There coexisted in this endeavour:

- the qualification-based *mandate* which was both educationally restrictive and compensatory in nature, given the 'backwardness' and 'distance' that separated the Portuguese educational standards from European ones;
- ambivalences and specificities, which suggested that this was a *political priority with limited* State *commitment* vis-à-vis the right of adults to education;
- the persistent challenge in the field by critical communities, individuals aspirations, practices and projects, to the domination of a neoliberal orientation.

In summary, the right of adult populations to education was thus confronted with (1) the denial of a public system, as well as a global and integrated adult education policy; (2) a field of policies and practices with restricted and precarious horizons, progressively fragile community roots and options which have been increasingly dependent on the State policies, objectives and targets, so often tactical, short term and servile to other spheres (e.g., the economy) and policies (like *employability* or welfare programmes).

Methodological issues

In the previous sections, we have argued that in the last 15 years Portuguese adult education policy has progressively turned from the initial *societal project To Know+, an educational commitment in the participation of all* conceived in 1998/1999 to the more restricted, planned goal of making schooling to the 12th year the reference qualification for the Portuguese adult population (within the New Opportunities Initiative implemented between 2005 and 2010). As we underlined, this means that once more the public system and the non-existent public, global, adult education policy were denied. However, a significant public education and training provision for the certification of the adult population has been put into practice, based on a limited compromise, but with full direction from the State and the involvement of a large array of entities, from the profit-making, State/public and *third sectors*.

Within this framework, this article aimed to understand the meaning of the social visibility and priority given to adult education and to lifelong learning in Portugal in the last decade. Also, it has been directed at a discussion on the adult education policy based on the changes forced by the lifelong learning agenda, namely the transformations that could be identified in State intervention in this specific field of practice. Having these aims in mind, the following questions guided the discussion:

- How were lifelong learning guidelines (from the EU) reinterpreted by adult education policymakers in Portugal?
- What were the implications of such reinterpretation to State intervention in adult education, namely when a civil society organisation was concerned?

The empirical data analysed in this paper come from qualitative research, and our central methodological strategy is based on a *case study of adult education policy* whose purpose is to identify and discuss a wide range of dimensions included in the implementation of a public policy (such as aims, strategies, actors involved, provision and its pedagogical structure, evaluation and assessment). The aim of the study was to interpret the relationships established between the State and the education of adults, particularly in the context of certain educational provisions. In this sense, this research attempted to understand the tensions that were in evidence in developing an adult education policy, which had been defined on a national level and above, and yet interpreted by a local, civil society organisation. Civil society organisations include a wide range of institutions that are not directly State-dependent nor firms with profit-making aims. These are organisations with a potential for civic mobilisation of civil society and democratic development within popular education, projects and activities developed, ‘at the fringes of the political-administrative system that tends to disparage them and which at any rate does

not rely on them in terms of public policies, programmes and resources of funding and support' (Lima 2011, 151). The case in hand focused on a civil society organisation (a local development association), which ran Adult Education and Training Courses (one of the main forms of its provision) between 2001 and 2005. The aim of this research was to investigate the way that a public policy, which was legally defined and which consisted of certain educational processes and official procedures, could influence the modes of acting locally by this civil society organisation. For this reason, semi-structured interviews were conducted with leaders and technical staff of this local development association. These interviewees were selected due to their involvement in the aforementioned courses, in the application for funding for such provision, or in the implementation of the courses (being engaged as trainers or other adult education staff). Therefore, these interviewees were quite familiar with the aforementioned provision and they also shared strong opinions concerning the strengths and weaknesses of these courses. These interviews focused on various aspects, such as the representations these actors had concerning the aims of the public policy, strategies developed, the pedagogical structure of the provision, evaluation and assessment of activities and of the programme. The data presented here concern the representations of these individuals regarding these changes – in essence, the reinterpretation or local appropriation given to lifelong learning and to the State involvement in adult education (Guimarães 2011).

A civil society organisation reinterpreting lifelong learning

The local development association under study, a civil society organisation, was one of many organisations that belong to the *third sector*. The third sector, a complex field, comprises a wide and heterogeneous array of non-State organisations that are non-profit-making and are geared towards different ends. When called to participate in the implementation of EU lifelong learning guidelines and the adult education public policy, these entities position themselves, even if only theoretically, as an alternative to the State and the market, in spite of their partnerships with the State (based on contracts following applications) being a key characteristic of their intervention.

This association does not differ greatly from countless others that existed in Portugal at the time. Many of these entities present themselves as places for learning and fostering social change, a privileged *locus* for the class struggle (Montaño 2002). They favour the furtherance of expertise and knowledge relevant to participating in various struggles and social emancipation movements. At their best, these organisations are agents for social transformation, with an important role on a local, national and global level. They promote initiatives that permit individuals and their communities to face, resist and change the relationships of power which stem from the development of the capitalist economy (Lima, Guimarães, and Oliveira 2007, 41). In essence, they

emerge as strongholds of progressive and activist educators, as well as privileged spaces for research and alternative projects for more socially and politically engaged academics.

However, within the framework of Portugal's integration into the EU and the State's withdrawal from social domains, many of these organisations now present themselves as places where one can find markedly instrumental educational processes, endorsed under policies that are not always exclusively aimed at equal opportunities, a universal right for social justice and the promotion of participative democracy. From this perspective, while many studies emphasised the goals of social transformation and emancipation, many others highlighted the managerial and market strategies which these entities observed in a political, economic and cultural context, with a neoliberal influence and a national educational agenda significantly structured by global processes and pressures (Dale 2001). Paradoxically, those strategies led these organisations to develop processes of social reproduction and continuance of social inequalities (Lima and Afonso 2006; Lima, Guimarães, and Oliveira 2007; Lima and Guimarães 2008).

In the case of this local development association, it had been in operation for more than a decade, having its own goals. Due to its history, these goals were the result of arrangements between fundamentally distinct objectives, some more connected to the interests of the local communities which it was part of and others geared towards adapting the organisation to the possibilities and challenges of public policies, namely State and EU programmes to which the association had applied.

As one of the respondents stated, the association was created with the purpose of 'using funds from the European Union to encourage development in other areas that are off limits to the municipalities' [E(D)2]. So the emergence of this organisation distanced itself from the idea of an entity that could become a privileged instrument for democratisation, an agent for the civic and political training of local communities, of resistance, of social transformation, in other words, of a counter-hegemonic nature. This is particularly true since there was a need for a strategic arrangement which, on the one hand, justified the creation of an association to the local communities but which, on the other hand, responded to challenges proposed by the EU, specifically the LEADER I Programme. It was in this context that the main aim of this association was defined, namely, integrated local and rural development. This, on the whole, had not been totally achieved. As the same interviewee mentioned, since it was established, the association had performed 'the transformation of bread, in which bread is made from crumbs; with little money our people were able to do big things […], much of the work we did was with just a few pennies' [E(D)2].

The main goal of LEADER I included the creation of jobs and the improvement of local communities' organisational and intervention abilities,

as long as these initiatives respected the environmental and cultural heritage of rural areas. According to one of the interviewees:

> [Regarding the objectives pursued by the association] I can boil them down to a broader one that is integrated rural development, which essentially means improving the way of life of rural populations. These include the living conditions of the populations of rural hubs in the mountains, which experience more difficulties; economic conditions, like the opportunity to support small and medium industries; craftwork, hence local products; rural tourism. [E(T)1]

As happened with other entities that sought to reduce the asymmetries between urban areas and rural or interior regions stemming from the globalisation processes (Melo 2005; Fragoso and Guimarães 2010), the link between the association under study and the EU programme provided the keystone to which its intervention was defined. This association later received support, for example, from the European Social Fund, to promote many other development and educational activities. It was this funding that finally determined what this organisation would become in terms of local action. Far from being anchored on principles aimed at solving problems that are significant to the local populations and interventions of an emancipatory and, to some extent, humanist nature, within more traditional adult education trends, this association's interventions comprised an array of activities that are relevant to objectives included in political, educational and pedagogic dimensions of neoliberal policies and EU guidelines. In fact, the possibility was raised initially of creating alternative actions that contained resistance processes to be carried out with local populations, to construct a space for civic intervention, a 'school of citizens, who would be capable of accurately analysing their personal situation, the situation of their society and finding more coherent and appropriate routes, through an integrated, participatory intervention that would generate autonomy' (Melo 2005, 18). But, as one of the interviewees stated:

> The associations themselves had to adapt to survive. To achieve this, they had to widen their range of activities. The only way was to make use of existing support funds. These support instruments are all public. Whether they are financed by national funds, or by EU funds, they are all public. [E(T)2]

As such, adhering to goals established by the EU favoured the appropriation of an expansion development model on a worldwide scale which conformed to principles for capital accumulation and concentration of investments, exclusively guided by the principle of maximising return and profitability, within the framework of neoliberal globalisation (Melo 2005, 18). Even if there was a certain scope for reinterpretation and recontextualisation of the guidelines issued by the EU (Guimarães 2011), in reality these, in the end, imposed a number of conditions of existence and action that profoundly affected this organisation and its role in adult education. These conditions led to upholding

a concept of rural development framed by reasoning of a national and supranational nature where adult education tended to assume a secondary role.

A civil society organisation caught between a rock and a hard place?

The history of this civil society organisation reveals significant changes in the relationships established with the State. As with many others, in the context of these changes, this association positions itself today as a political mediation organisation. It was officially and socially considered a partner of the EU and the State in the provision of certain educational activities (Guimarães 2009) which have their most successful role in their adjustment (Rothes 2009) to challenges proposed supranationally and nationally. Consequently, this entity revealed new facets to its status and had a new identity: a somewhat fragmented identity caught between addressing the local problems experienced by the people and the objectives proposed by the different financing programmes (both EU and national). This situation also resulted in, and was the cause of, a progressive professionalisation of its human resources and its work processes. For these reasons, today it is poles apart from the structure and methods associated with the local intervention of popular associations and participative democracy.

In reality, the mediation processes employed by this association had various levels. On a first level, they involved the State and the EU, through agreed-to applications and contracts. On a second, they occurred when a relationship was forged with the local community and initiatives were disseminated. Here, mediation was part of the relationship between the State and the citizen. Within this scope, these associations developed mediation processes based on public policies in local communities. Other forms of mediation included relationships adopted between trainees and local employers, in particular as part of initiatives that comprised training within the work context. In this case, these organisations were an intermediary between adults, the local economy and work. Another mediation relationship connected the State, local businesses and trainees, given that these associations took on responsibilities regarding education and the search for qualification opportunities for individuals who might, one day, work in these businesses. For these reasons, the status of political mediation organisation was particularly important: it determined the creation of adult education initiatives and enabled the organisation to survive.

Yet these mediation processes suggested that the State was increasingly incapable of endorsing priorities which should be its entire responsibility, within the framework of distributive policies that are more characteristic of the welfare State. In the attempt to expand a basic social right (Bélanger and Federighi 2001) and the effort to achieve a public adult education system based on a State policy, the State transferred this responsibility to civil society organisations, among others. These became important partners in educational

and social provision, taking on tasks for which they might (or might not) have the experience and tradition. For this reason, this mediation had the status of a second possibility because, even though it fulfilled a duty that would be up to the State, these tasks were performed by entities other than State ones, based on decisions taken by the State itself, who may reform them in a more or less distant future in light of the goals of the adopted policies. There is here an effect of *pluralisation* (as a result of the involvement of entities other than State ones in attaining a public policy) and *fragmentation* of the State's activity (now shared among many other State and non-State entities), as stated by Claus Offe (2005). Since such developments, as we saw, tended to occur through the dynamics and effects of centralisation/decentralisation, the processes of *dispersion* reconstruct the power of the State on a new basis, as the *managerial* State, proposed by Clarke and Newman (1997). Simultaneously, the *pluralisation*, *fragmentation* and *dispersion* effects occur within a political framework of change, conveying a temporary character to this organisation's status of political mediation.

In this socio-political context, these organisations are under strong regulation and coordination from national and supranational public departments. This control conceals a plethora of tasks and responsibilities put upon such civil society entities by the State. This situation leads these organisations to become extensions of public departments (Lima and Afonso 2006). It thus seems that, within the framework of a local reinterpretation of EU guidelines for lifelong learning, State intervention has changed. Within this change (previous State) responsibilities concerning adult education were concealed from civil society organisations. These responsibilities were added by regulation procedures that have involved a restriction of civil society organisation autonomy for devising meaningful adult education projects for local communities.

Lifelong learning: adult education policy without a local educational project

The condition of political mediation organisation falls under a *new educational order* (Field 2006; Antunes 2008) which was instituted by the EU and Portugal and is based on a *contract culture*. This culture presents itself as a particularly successful strategy as, this way, the State manages to foster changes on a wider scale and in a more effective way than if done through the public services responsible for adult education (Field 2006, 36).

These changes are accompanied by *less government and more governance*, as advocated by Nikolas Rose (1999). Owing to the characteristics of the processes of application and development of the initiatives, local organisations that promote adult education are confronted with several control mechanisms. The State seeks to ensure the accountability processes. These mechanisms have generated an excessive increase in benchmarks, indicators of success, of

numbers. For this reason, emphasis is placed on values pertaining to the certification of entities, the specification of quality standards such as those that reinforce the need to meet minimum performance criteria of courses offered by stipulating a minimum number of trainees for financing activities or the certification of a certain number of individuals. In truth, these transformations are induced by the State, through processes that seem to be quite effective, but which do not leave great margins for change by the organisations themselves. As a result, the intervention of the civil society organisation under analysis encompassed great tensions, aggravated by the fact that in rural areas and small towns, such being the case of the region where this local development organisation was based, both working and unemployed adults faced many challenges regarding socio-economic development.

There were several meanings of 'education' and 'development' perceived by the respondents. It was clear that they displayed a definition of development in which the stimulation of the economy and creation of jobs was fundamental. In the words of one of the interviewees: 'So that is one of our greatest concerns: to provide an appropriate qualification for people to then get their own job' [E(D)2]. Moreover, the respondents felt that this definition of development should include the conservation and preservation of local heritage, both architectural and natural. Despite being interesting, these perceptions were far from incorporating education and, especially, adult education, as an essential component. In fact, it only presented itself as an instrument, a strategy to promote economic and social development.

For this reason, this association's educational project was non-existent for adult education agents. According to one of the interviewees, 'I don't even know of any document with a structure that allows me to claim there is [an educational] project. If you ask me "Are there training projects here?" There are. But an educational one…' [E(T)2]. For others, it was a vague reality: this project was seen as a necessity that would legitimise the association's intervention, but it did not have a clear outline. It depended on the national and supranational support programmes that would be created. Finally, for others, there was a *virtual project* which was strongly contingent on public policies. It was therefore an educational project supported by supranational and national guidelines, but, when present, did not consider the problems and interests of the local population. It varied according to the goals established in current public policies, which had a crucial focus in combating unemployment. As one of the interviewees put it:

> So we always applied for more courses than those that were approved, in order to respond, also, to two important sectors. Firstly, to sectors that had the opportunity to employ people, and to the need that people felt regarding their training, too. We always try to do this, to listen. What are we providing training for? For unemployment? We weren't interested in that either. To give training so that people could have a tool and later work. [E(D)1]

While the characteristics and challenges people faced can be inferred from the interviewees' words, the absence of a critical discourse in this civil society organisation was still surprising and denoted the congruence or derivation of its intervention in relation to national and EU policies. It should have been a discourse that was more centred on local problems and needs, curious in terms of experimenting with alternative pedagogic methods; in this way, it should have invented adult education based on local characteristics or recontextualised national educational policies, its rules (uniformly enforced) and its constraints, with questioning creative and socially emancipatory, participative dimensions that had a strong local impact. Equally strange was the difficulty the association's agents revealed in indicating an integrated and coherent educational project comprising local history, experience and social recognition; that is, specifically, a project that conveyed the sense of work accomplished and reflected a global and integrated associative policy in which adult education played a key role.

This gap enabled the emergence of an instrumentalised view of adult education, profoundly connected to stimulating the local job market, which, it was anticipated, would help to anchor the local population. In fact, these aspects were clearly the framework for depoliticised adult education, which further emphasised individual autonomy and the individual's responsibility for their professional paths; consequently, there was no questioning of the possibilities that adult education could achieve when incorporated into wider social and economic policies of a progressive and humanist nature.

It was within this context that participants established the relationship between education-training and local and rural development, since 'you can't have development without people' [E(T)2]. Individuals were seen as fundamental capital for local economic stimulus. In essence, this was the notion of adult education as a human resources management and training strategy (Lima 2008). As one of the interviewees maintained:

> I think that the [association] did well to invest in training. […] When the [association] began to do training, we started with training promoters of touristic projects, in the area of rural tourism, which is a course we have. […] And we did some aimed at … more connected to specific areas, like, for example, for farmers who work with agriculture or cattle. More technical courses actually. It is important because you cannot have rural development without people. […] We are also raising people's awareness, perhaps younger people – you can't get to them all – but even if some of them adhere to this type of activity and stick [around] it will make them economically viable. [E(T)2]

This portion of the interview is illustrative of the inherent tensions of the decisions made by the civil society organisation concerning rural development. Were these the options that served the local and community development? Were they the options that were best suited to the goals established by national and EU policies? It would be possible to articulate options so that adult

education proved to have a stronger emancipation dimension, for the transformation of social relationships and local ways of life. In truth, locally, there was greater visibility of adult education, which accompanied the adoption of public adult education policy. However, at the same time, there was a naturalisation or uncritical (though strategic) acceptance of the relationship between rural development and the management of human resources. Adult education presented itself mostly as an opportunity to reinforce the project of the rural development association based on its survival conditions and to foster the creation of local employment opportunities following EU guidelines. This framework led to an intervention which was unable to challenge a development perspective responding to national and European priorities. Therefore, the more adapted this civil society organisation was to public social policies, the more it became reinforced and permanent. Nevertheless, its political and functional autonomy was revoked through these processes, making it subordinate to the State and reducing its capacity for local and community integration and for fighting against institutionalised powers.

The lack of an educational project in this civil society organisation is representative of this point. Adult education was kept in a situation of dependence on public policy guidelines and goals, which imposed neoliberal and instrumental ideas of the economy, society and adult education that fostered the education–economy relationship. To make this situation worse, the association tended to gravitate around the State. As a result of depending on the State, it adopted political stances, relatively isomorphic ways of intervening regarding public administration and its rules. It converted functionally to the existing formal rules (Lima, Guimarães, and Oliveira 2007) inspired by a *globally structured agenda* for education with neoliberal guidelines, thus limiting the emergence of alternative, critical and probing ways of thinking and behaving that are more characteristic of critical and progressive sectors of adult education.

Some final remarks: a political priority under State-limited commitment or tensions, fragilities and challenges in grassroots action

The 'unacceptable educational deficit' for democracy in Portugal led in the last 15 years, in the socio-political and cultural contexts of the tendency to *managerial* State reforms, to a political option concerning the expansion of adult education provision. This endeavour emerged without compromising a public system structure (and a global and integrated adult education policy). This occurred by turning back to most of the proposals of the programme documents (1998 and 1999) elaborated by the Working Group (1997) and the Mission Group (1998), designed by the government. So, the analysis of this political process suggests tensions and ambivalences in the formulation and promulgation of the revival of adult education in Portugal, under the auspices of European lifelong learning strategy. We propose an interpretation in terms

of a *globally structured* national political *agenda for education*, much constituted by and expressing Portuguese specificities. It is observed that adult education policy followed a pathway that progressively distanced itself from a proposed mobilising *societal project* (as in the initial programme documents and developments). In turn, it became closer to being an instrument of *competitive advantage*, being more strictly aligned with the European lifelong learning guidelines delineated in the framework of the Lisbon (and European Employment) Strategy.

The minimalist political choice about the political instruments of defined temporary action as a Program and an Initiative reveals the uncertain State involvement with regard to the distributive and democratising dimensions of public social and educational policies as well as the interests and demands to which these policies applied. Therefore, a *governance* formula has been put in place which takes the form of *pluralisation/decomposition* and *fragmentation/dispersion* of the organisation of the education public service and the inner State. Nevertheless, it continues to take important political decisions, after which an array of promoters deliver the service under contractually defined conditions. Moreover, the provision network adopted several forms of precarious labour relationships, contracts and statutes, assimilating public and private promoters under similar standards and rules. Above all, monitoring the outcomes previously fixed by the State has been an important part of the work. This political action framework has brought important tensions and dilemmas between education/training/certification to many organisations and adult educators involved. Thus, the civil society organisation studied reveals a restriction of its autonomy for devising meaningful projects for local communities, among other aspects, due to regulation procedures based on an excessive increase in benchmarks, indicators of success and numbers (such as those that reinforce the need to meet minimum performance criteria).

The social mobilisation around adult education and the local commitment to populations living in difficult conditions constituted equally relevant facets of the political dynamic that was launched, with different rhythms and phases during the last decade. The strong official, political commitment to elevate the education/qualification levels of the Portuguese population through an unprecedented enlargement of public provision, the involvement of *progressive pedagogues* and educational activists constituted other ambivalent traces of national realities that nuanced appropriation of European lifelong learning strategy. In this sense, we can find tensions and somewhat fragile, tentative articulations between more *political* and *planning* (Melo 2007, 65) processes of educational change emerging from divergent projects and practices of adult education. As empirical data suggest, the civil society association(s) deploy(s) several important mediation processes at various levels, involving, for instance the State and the EU, public policies in local communities and mediation among adults, the local economy and work. The reinterpretation of lifelong learning by

this civil society organisation puts strong emphasis on a rural development project, profoundly connected to stimulating the local job market and including the conservation and preservation of local heritage, both architectural and natural. Yet, we have seen in a framework where adult education takes a central role in economic and employment policies, how a local association takes on the dissemination of adult education activities framing their actions as a tool to support the economy and strengthen the individual's ability to face economic and social risks and uncertainties. If there are connections to, and perspectives of, community grounding, they are rarely formulated so as to become an educational agenda capable of challenging, thus widening, the strict mediation role stemming from European and national policies. Thus, a further step in the assimilation process has taken place with local development and civil society organisations' difficulties in building enlarged meaningful adult education activities.

We therefore highlight the national appropriation of European guidelines for lifelong learning, within the framework of the European Employment Strategy and the Lisbon Strategy, evidenced firstly by the To Know+ Programme, only partially fulfilled, and later by the New Opportunities Initiative. The latter became more suited to providing qualifications to Portuguese people, raising their level of education, as well as encouraging more significant social mobilisation in terms of the public provision of certain fields of adult education. At this point, we raise the following question: Can the local interpretations of civil society organisations pertaining to lifelong learning serve local communities and purposes of local emancipation and justice proposed by the more progressive sectors of adult education? Conversely, local appropriation, as perceived in this study, seems to conform on important levels to the role of translating this qualification objective, contextualising it as a tool for rural development. In this case, the following issue emerges: Under what conditions can civil society organisations, in their role of political mediators, seize opportunities for the political and educational autonomy and reinvention that this status attributes to them?

As mentioned by Clarke and Newman (1997), the reforms of the *managerial* State, such as the one that configures the institutional arrangement for educational provision here described, reveal a facet of expansion of the State within a civil society that is organised in a fragile and dependent way. What remains is the hope that other data and/or studies can attest to what has been suggested, for example, by Lima (2008), Castro et al. (2007) and Guimarães (2011) in other projects (Lima and Guimarães 2012). That is, we need to investigate how, in certain areas and circumstances, the same socio-political innovation can generate dynamics and perspectives of action that are able to challenge the limits of the official outlined agenda in favour of competitiveness and social cohesion, and reinforce the cultural, civic and educational dimensions of the adult education policy.

Notes

1. This was an innovative programme (when considering the previous public policy centred on second-chance formal education) for several reasons, such as the conception of new forms of provision (such as the Recognition, Validation and Certification of Competencies and the Adult Education and Training Courses in this article under analysis) and the articulation of education and training in its main forms of provision (such as the aforementioned courses).
2. The New Opportunities Initiative added some aims to the public adult education policy (such as developing provisions to improve Portugal's economic performance in the framework of globalisation in accordance with EU orientations), but kept the same provisions (namely recognition and prior learning and the Adult Education and Training Courses). Perhaps the most interesting development of the New Opportunities Initiative was the dramatic increase in access that occurred, especially owing to the Recognition, Validation and Certification of Competencies facets leading to school/academic certification, which involved around half a million adults who were certified with a school education diploma.

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